Commonwealth Corps

Program Director Handbook

2009-2010

COMMONWEALTH
CORPS
INSPIRE. UNITE. ACT.

MASSACHUSETTS
SERVICE ALLIANCE

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Introduction

Commonwealth Corps

Commonwealth Corps works with non-profit organizations and public entities to reinvigorate civic involvement to help address the Commonwealth's most urgent needs. Commonwealth Corps members work to strengthen the bonds of common purpose and unite people in service for the common good. Corps members provide direct service and recruit, organize and mobilize additional volunteers – building a grassroots movement of volunteers dedicated to service.

Massachusetts Service Alliance

The Massachusetts Service Alliance is a private, nonprofit organization that serves as the state commission on community service and volunteerism. Its mission is to catalyze the innovation and growth of service and volunteerism by creating partnerships that maximize resources, expertise, capacity, and impact.

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Recruitment & Selection

Using terms like "service" instead of "job" or "work" and "member" instead of "staff" helps to reinforce that Commonwealth Corps is a service opportunity, **not** a job, internship, or other volunteer position

1. Create a **position description** for each member role. This should have been approved by MSA as part of your grant conditions.

2. Post advertisements through your available channels. Remember to keep your position description updated on the **Connect & Serve** website: http://volunteer.united-e-way.org/mass-service/volunteer/

3. Determine your **selection process and criteria** before beginning selection. All applicants should go through a fair and equitable selection process.

4. Applicants should submit a **Commonwealth Corps application** and any other documentation/information your program requires.

5. Determine if your program will require **reference checks** for members. If so, set a standard process for reference checks to ensure consistent checks for all applicants. Any documentation of completed reference checks should be kept in the member files.

6. **Set your program's interview questions.** Use the MSA-supplied questions as well as any program-specific questions your organization has. A fair interview process should be in place to ensure all applicants have equal opportunity to interview. Interview notes should be kept in member files.

7. **Send your selected members a letter** (using the MSA-supplied template) to inform them of their acceptance into the program. Keep a copy of this letter in their files.

8. Conduct **criminal background checks** for all members who will have regular, unsupervised contact with vulnerable populations.

    This includes a CORI (Massachusetts check) as well as SORI (which can be performed for free through the following website: http://www.nsopr.gov/Core/Conditions.aspx). Results of background checks should be kept separate from member files in a locked cabinet. However, indication should be made on the member file checklist that the CORI has been reviewed and the member is eligible for service.

9. Members should not begin direct service until they have cleared their background checks.

REMEMBER!

Members should be selected for service positions based on pre-determined criteria. Members must be willing and able to fulfill the service term requirements, including the full length of service and number of hours. A member role, slot type, or term of service should not be adjusted to fit applicants' needs or interests. If a prospective member is unable to meet the basic requirements, he/she should not be selected for service.

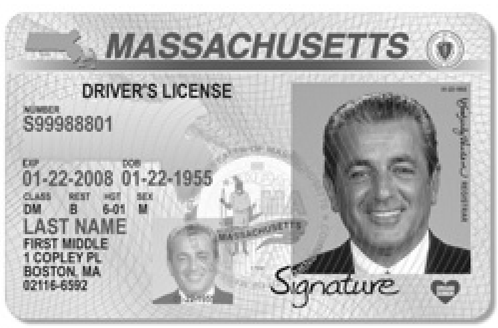
Enrolling a Member

1. Notify the member of their acceptance to the program and keep a copy of this notification document in their member file.

2. Have all members complete the member eligibility form and provide supporting documentation to prove their identity, age, and Massachusetts residency.
   A Massachusetts-issued photo ID will cover all three criteria.
   If a Massachusetts photo ID is not available, any state- or federally-issued photo ID will suffice **in addition to** proof of temporary residency (e.g., a lease or utility bill showing a MA address or proof of enrollment and campus residency from member's college/university).

3. Fill out and sign the second half of the eligibility form.

4. Copies of documents proving age and Massachusetts residency must be kept in member files.



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NSTAR Post Office Box 4508, Woburn, MA 01888-4508

JANE SMITH
26 ADDRESS STREET
YOUR TOWN MA 02215-1617

NSTAR Gas

MAKE SURE TO CHECK OUT "IN FOCUS," NSTAR'S CUSTOMER NEWSLETTER INCLUDED WITH YOUR BILL. THIS LATEST EDITION INCLUDES INFORMATION ABOUT NSTAR'S BUDGET BILLING PROGRAM, OTHER WAYS YOU CAN MANAGE YOUR ENERGY COSTS AND IMPORTANT SAFETY TIPS. NSTAR'S QUICK AND CONVENIENT PAYMENT OPTIONS, E-BILL AND PAY BY PHONE, ARE ALSO HIGHLIGHTED.

Account Number	Billing Date	Next Read Date
1335 041 0006	Sep 14, 2006	Oct 12, 2006

Member Files

All members must have a member file. Files are required to contain the following documents:

Member file checklist (including signoff of completed CORI and SORI check)
Member application
Interview notes
Copy of notification of member's acceptance
Member eligibility form
Copy of eligibility documentation (e.g., MA license)
Member contract
Proof of health care coverage (full time members only)
Member timesheets to date
Member mid-year evaluation form (if applicable)
Member end-of-year evaluation form
Member exit form

Member Orientation

PLANNING ORIENTATION

Plan orientation and select date(s) in advance – this information should be provided to and reviewed by MSA as part of the grant conditions.

Communicate required date(s) of orientation to prospective and selected members during recruitment and selection process.

Conduct orientation for all Corps members as one group, not individually or in small groups.

> If members are placed at geographically diverse sites, orientation can take place separately by site. Site partners need to be adequately trained and prepared to conduct member orientation, particularly regarding Commonwealth Corps components.

Add your program's information to the MSA member orientation PowerPoint.

> ***Even if you are not using a PowerPoint presentation as part of your orientation, you should still cover the content provided within the PowerPoint***

ORIENTATION AGENDA

Orientation serves multiple purposes: to inform members of the service terms; to introduce them to the agency and program staff; to introduce them to each other; to begin forming their Corps identity; etc.

> ***Best practice:***
> *Use the time together at orientation for ice breakers/teambuilding within the Corps.*

Include a detailed review of all components required by the Commonwealth Corps grant provisions.

Review member contract components in detail. Member contracts should be reviewed and signed on or before the FIRST day of service.

Review required dates for trainings, meetings, upcoming events, etc.

Distribute individual service schedules including service activities, supervision, etc.

Although members should be selected in a timely fashion to ensure all members begin at the same time and are oriented together, there will be occasions when a member begins later (e.g., slot refill). These members should have an orientation to Commonwealth Corps and the contract, even if it is abbreviated from the original orientation.

Member Development & Training

Identify required training dates as far in advance as possible. Ideally outline them on a calendar that can be distributed to members as soon as possible.

Throughout the year, find a way to formally or informally survey members regarding what types of training they want and/or need both to support their service as well as their professional development.

Members can lead trainings for other Corps members, particularly if your members bring a diverse set of skills that would be useful to share.

Some examples of member development activities include:

- **Service-related trainings** – to support members' specific service activities
- **Skills-based trainings** – to strengthen and expand members' skill sets for service and other activities
- **Professional development/life after Commonwealth Corps training** – to prepare members for the next step(s) after their service
- **Information sessions** presented by guest speakers and/or staff on the community or population served – to give members a better understanding of the community they serve
- **Teambuilding activities** – to strengthen "esprit de corps." These group activities can be included as part of another training, or can be fun outings together such as doing a ropes course or visiting a museum.

<u>Civic Engagement</u>

Members are expected to increase their commitment to civic engagement during their term of service. (See page 13 for additional information on the Ethic of Service and Civic Responsibility.)

Members will be given a pre- and post-service survey to measure their commitment to and engagement in civic activities. Programs are expected to support the development of members' civic engagement!

Member Supervision

INDIVIDUAL

1. Identify a supervisor for each member.
   - The supervisor can be a staff person at an organization directly overseeing the member's service activities, but this person should be knowledgeable about Commonwealth Corps, provisions, allowable activities, etc.

2. Schedule regular times for members to meet one-on-one with their supervisor at least once a month.

3. Individual supervision should include reviewing service activities, discussing member performance, resolving any issues, reflecting on member development and civic engagement, giving and receiving feedback, etc.

GROUP

1. Members should have the opportunity to meet as a whole group with the Corps supervisor.

2. Group supervision time can be used to review activities, give updates, give and receive feedback, plan group projects, etc. It should also be used for group reflection and discussion activities.

3. Members hosted at different sites under one grant can meet as a Corps by location. However, it is strongly encouraged that whole Corps meetings (across all program sites) occur at least once or twice a year to promote the Corps identity.

Corps meetings are a great way to incorporate the ethic of service and civic responsibility!

Member Evaluation

<u>Before the Evaluation</u>

1. Flex-time and alternative flex-time members are only required to have an end-of-year evaluation, while part- and full-time members must have a mid-year and end-of-year evaluation.

2. Set dates or a timeline in advance for mid-year (if applicable) and end-of-year evaluations and communicate this timeline to members.

3. Communicate evaluation criteria with members so they are aware of what is expected of them.

4. Make sure your completion bonus policy and/or evaluation criteria clearly identify what the evaluation requirements are to receive the completion bonus.

5. Provide ongoing informal feedback to members through individual supervision.

6. Provide members the opportunity to evaluate the program formally or informally.

7. Create a "disciplinary policy" to set a fair and equitable process in place to address underperforming members. This policy should be included in member contracts and reviewed at orientation.

> **Best practice**: let MSA review your disciplinary policy to ensure it does include unallowable disciplinary responses!

<u>Conducting the Evaluation</u>

1. Supervisors should fill out the member evaluation form(s) in advance of meeting with the member.

2. If members will be asked to evaluate themselves, ensure they have the evaluation tool in advance.

3. Supervisors should meet with each member individually to review the evaluation, check in with the member's satisfaction with the service year, and set performance goals.

4. Supervisors and members should sign and date the evaluation form at the time of the evaluation.

5. If a member receives a negative evaluation at mid-year, the supervisor should work with the member to create a corrective action plan. Supervisors and members should sign and date the action plan.

Tracking Member Hours

Timesheets are required for all members.

Members must track direct service and indirect (training) hours separately. Programs are encouraged to use the timesheet provided by MSA.

The timesheet must be filled out in its entirety – including activity, dates of service, week ending date, number of hours per day, etc.

All timesheets must be signed by both member and supervisor. Unsigned timesheets may result in the loss of hours and/or stipend.

Collect timesheets regularly (another good use of Corps group meetings!). Timesheets should be reviewed/processed regularly to catch any errors early on and to allow Program Directors to provide regular updates to members on their progress toward the hour requirement.

Suspending a Member

Members can be suspended for disciplinary or personal (e.g., medical, family) reasons.

If members will be suspended for disciplinary purposes, develop a disciplinary policy and include it in the member contract to ensure all members are receiving equal treatment regarding grounds for disciplinary suspension.

Members can be suspended for a maximum of two weeks at a time. Members cannot be suspended for more than one month total during their term of service.

To suspend a member for any purpose:

1. Obtain approval from MSA **BEFORE** suspending a member.
2. Notify the member in writing that they are being placed on suspension. Indicate the amount of time for the suspension.
3. If member is suspended for an entire stipend period, he/she should not receive a stipend for that period. Make sure this can be arranged with your financial department.

After suspension:

1. Ensure that the member signs and submits zeroed out time sheets for the weeks of their suspension.
2. The member and supervisor should create a plan for the member to make up the missed service hours. Members should be given adequate time to finish their service.

Member Stipends and Bonuses

Paying the Stipend

Stipend breakdown:

Type of Member	Number of Hours	Minimum Stipend	Maximum Stipend
Full-time	1600	$10,000	$20,000
Part-time	800	$5,000	$10,000
Flex-time	400	$2,500	$5,000
Alternative Flex-time	300	$1,875	$3,750

Members may waive the stipend. If they choose to do this, provide this option in writing and have a member sign off on it. This form should be kept in the member's file.

Stipends cannot be paid hourly.

Regular stipend payment amounts should be determined in advance and communicated to members during the selection process and in their contracts.

Refer to the provisions regarding additional stipend regulations.

Paying the Completion Bonus

Completion bonus breakdown:

Type of Member	Number of Hours	Maximum Completion Bonus
Full-time	1600	$1,800
Part-time	800	$900
Flex-time	400	$450
Alternative Flex-time	300	$338

Members who are eligible for a **full** completion bonus have:
satisfactorily completed the required number of service hours, **AND**
completed the required service term (as defined in advance in the member contract).

Members who are eligible for a **pro-rated** completion bonus have:
left service early due to personal/compelling circumstances, **AND**
satisfactorily completed at least 30% of the required service hours.

Members who are **not** eligible for any amount of completion bonus have:

not completed the full number of hours at the end of service, **OR**

not completed the full service term even if they have reached the full hours, **OR**

left service early for cause/a reason that does not qualify as personal and compelling (e.g., accepting a job, going back to school, etc.).

Member Recognition

Plan ways to formally and informally recognize your members for their service and accomplishments.

Recognition can and should occur throughout the year (not only at the end of service).

- This is especially helpful at mid-year when commitment can wane.

Member recognition does not have to be elaborate or expensive!

Recognition ideas:

- Remind supervisors to thank members on a regular basis
- Provide breakfast or lunch at an informal gathering with all Corps members
- Feature members and their activities in your organization's newsletter, email updates, internal communications, etc.
- Highlight individual member accomplishments in the mid- and end-of-year evaluation
- Have members give internal and/or external presentations on their project(s) and accomplishments
- Host a formal appreciation event at the end of the year for members who have completed service
- Give members a certificate of completion

Ethic of Service and Civic Responsibility

Members should have the opportunity to reflect on service and civic engagement individually and/or as a group.

Reflection can be personal journaling, discussions on service, writing exercises (e.g., Governor's Office contest), book/article discussion, etc.

Members should become more civically engaged during and throughout their year of service.

Ideally, members will develop a project to address an identified need that they will make their own (individually or as a group), recruit volunteers to help them with it, and then engage in the project on a one-time or ongoing basis, as the project requires. Group meetings are a good time to plan these projects.

Civic Responsibility: the responsibilities of a citizen; civic duty

Civic Engagement: Individual and collective actions designed to identify and address issues of public concern

Corps member meetings are not staff meetings. While it can be a good time to catch up on the status of what everyone is doing, these meetings should be used for more than updates. This is part of the benefit that Corps members earn by being part of a Corps and engaging in service versus work.

CIVIC ENGAGEMENT SURVEY

Members are expected to increase their commitment to and participation in civic engagement during their term of service.

All Commonwealth Corps members will be given a pre- and post-service survey to measure their commitment to and engagement in civic activities. Programs are expected to support the development of members' civic engagement!

ESPRIT DE CORPS

Regardless of member roles, all members should be aware of their participation in a Corps.

Exiting a Member

<u>IF EXITING A MEMBER EARLY:</u>

1. Contact your MSA Program Officer to inform them that you are exiting a member.
2. If member notifies you in advance that they are exiting service:
   - Communicate with member regarding reason for exit, particularly whether the member is exiting for personal/compelling circumstances or for cause.
   - Keep documentation on file regarding member's reason for exiting if personal/compelling circumstances.
   - Ensure that all of the member's timesheets to date are complete and in the member file.
   - Conduct an exit interview/final evaluation with the member.
   - Complete the exit form, preferably with the member, and both member and supervisor should sign it.
   - Keep the exit form in the member's file.

   If member exits unexpectedly:
   - Document if reason for exit is personal/compelling circumstances or cause.
   - Complete the exit form for the member and try to obtain member's signature.
   - If unable to obtain member signature, attach documentation to exit form demonstrating efforts made to reach member (e.g., emails, phone logs, etc.).
   - Keep the exit form and attached documentation in the member's file.

   Determine if exiting member is eligible for a pro-rated completion bonus.
   If yes, include amount in exit form and ensure that member receives payment.

<u>IF EXITING A MEMBER AT THE END OF SERVICE TERM</u>

1. The member should have an end-of-year evaluation with supervisor.
2. Ensure that all of the member's timesheets are complete and in the member file.
3. Determine if the member has completed the required number of hours for the full completion bonus.
4. Complete the exit form with the member and have both member and supervisor sign it. Keep the form in the member's file.
5. Expend completion bonuses before August 31, 2010.

REMEMBER!
In the 2009-2010 program year, members who complete the term of service but do <u>not</u> reach the full number of hours will not be eligible for any bonus amount.

Site Partner Management

Note: In this handbook, "site partner" refers to an agency that is fully hosting a Commonwealth Corps member, including taking responsibility for all aspects of member management. If your members do their service at additional agencies but are collectively managed by your agency, you do not need to train your partners in member management. But it's always a good idea to teach them about Commonwealth Corps!

All site partners must receive orientation to the Commonwealth Corps and member management.

Like member orientation, conducting site partner orientation as a group has many benefits (and you only have to do it once!) However, this is not required.

Add your organization's information to the MSA Site Partner Orientation PowerPoint.

Even if you are not using a PowerPoint presentation as part of your orientation, you should still cover the content provided within the PowerPoint.

Site partners should have a clear understanding of:

- What Commonwealth Corps is
- Allowable and unallowable activities for members
- Their responsibilities in managing the member (including orientation, training, timesheets, supervision, etc.)
- Their responsibilities to the Corps Sponsor agency (reporting, budget requests, etc.)

Your agency should have a formal contract with all site partners including, but not limited to, the following items:

- Corps Sponsor agency organization and site partner organization name
- Number of Corps members to be placed at the site
- Program dates during which the member(s) will be placed with the site partner
- An outline of site partner and Corps Sponsor responsibilities

Maintain regular communication with site partners to ensure they are supported.

Monitor site partner performance to ensure members are receiving adequate support and that the program is operating in compliance with Commonwealth Corps' and your organization's requirements.

Seek feedback from your site partners regarding your program.

Reimbursement Requests

Programs must submit at least three reimbursement requests per year, by each of the following dates:

February 26, 2010
July 12, 2010
September 30, 2010

Requests must include two MSA forms – the cover page and expenditure report

- Instructions for each form are included in the program binder
- Both forms must be signed and the originals mailed to MSA

Requests must include supporting documentation for grant funds AND matching funds

- Supporting documentation can include the general ledger, payroll register, receipts, invoices, etc. MSA prefers just the general ledger and not receipts.

Direct program support costs – This line item is 14% of the stipend award. **The amount drawn down each period can only be 14% of the stipend requested for that period.**

All funds, including member bonuses, must be expended by August 31, 2010.

Reimbursement requests are processed twice per month. Accurate, complete reimbursement requests received by the 15th of the month will be processed by the 30th. Accurate, complete reimbursement requests received by the 30th will be processed by the 15th of the next month.

Inaccurate or incomplete reimbursement requests will be returned. Corrected requests can be resubmitted to the next payment cycle.

A lack of supporting documentation will delay your reimbursement request!

Programmatic Changes

Request approval from your MSA Program Officer prior to the requested effective date for all of the following:

- Changes in program focus or goals
- Contracting out program activities funded by the grant (unless approved in your
- application) other than the purchase of supplies, equipment, or general support services
- Changes in the program start or end date
- Changes in member slot configuration – slot conversion or refill

Your Program Officer will inform you if additional documents are needed to approve/confirm your programmatic changes.

Budget Amendments

Communicate all budget changes to your Program Officer. A budget amendment request must be made prior to the requested effective date.

Prior approval from MSA is required for:

- Any change in the line item budget in the amount $1,000 or more
- Any change that affects direct program support costs

Once budget amendment(s) approved, submit a new budget form to your Program Officer showing the change(s).

Slot Changes

"Slot change" refers to two types of changes:

1. Slot Conversion: changing a slot type into another type (e.g., 1 part-time to 2 flex-time)
2. Slot Refill: substituting a new member for a member who has exited the program before completing 30% of the total hours of service

All slot changes must be requested from **and approved** by your MSA Program Officer before any action can be taken to make the adjustment.

Members cannot change slot types after beginning service.

Slot Conversions

1. Submit the slot conversion request form to your Program Officer; clearly explain why you are changing the slot type, including how the roles and responsibilities of the new slot(s) will cover what was planned to be done by the previous slot type.

2. If the slot conversion will affect the budget (e.g., converting 1 part-time to 1 flex-time instead of 2) submit a revised budget. The conversion **cannot** increase the grant award.

3. Wait for approval from your Program Officer **BEFORE** advertising or recruiting for the position(s).

4. Upon receiving approval, you may begin recruitment and selection for the new slot(s).

Slot Refills

1. Contact your MSA Program Officer as soon as you know you will be exiting a member; let them know you would like to refill the slot.

2. Submit the slot refill form; be sure to include information on how many hours the previous member served and how much stipend they received. Remember that a slot can only be refilled if the exiting member completed less than 30% of the total service hours.

3. Wait for approval from your Program Officer before selecting a member to refill the slot.

4. Upon written approval from your Program Officer, you may begin recruitment and selection for the open slot.

The new member is responsible for completing the full number of hours for the slot (1600, 800, 400, or 300) and should receive the regular stipend for that slot type, but they will not receive the full stipend amount for that slot. This makes it especially important that the program ensures that a member can complete the required hours in the time remaining in the program.

Resources

- Commonwealth Corps provisions
- Program director handbook
- Program calendar
- Member roster form
- Member application
- Member acceptance letter
- Member interview questions
- Member contract
- Member orientation PowerPoint
- Site partner orientation PowerPoint
- Member file checklist
- Member exit form
- Member timesheet (sample)
- Member evaluation (samples)
- Slot conversion form
- Slot refill form
- Fiscal forms
  - Cover sheet
  - Expenditure/Projection report
  - Midyear financial report
  - Final financial report

All resources are available on MSA's website:
http://www.mass-service.org/resources/grantees.php